

Clinical Administrator's Guide Schedule Management



SCHEDULE MANAGEMENT SERVICE (SMS)

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Terms All Staff Should Know

- **Enrolled Patient:**

- A patient enrolled in TRICARE Prime.
- All active duty patients are TRICARE Prime
 - Some active duty are not enrolled, but should always be treated as so.
- All active duty family members can enroll in TRICARE Prime at no cost to the family
- All retirees below the age of 65 can enroll in TRICARE Prime when they pay a premium (\$220 or \$440/family)
- All TRICARE **Plus** patients are considered enrolled for **primary care only**.

Terms All Staff Should Know

- **TRICARE Access Standards:**
 - The government has promised TRICARE Prime patients they will receive appointments within a certain amount of time
 - Acute: 24 hours
 - Routine Primary Care: one week
 - Wellness Primary Care: four weeks
 - New Specialty Appointment: four weeks
 - Sierra (or WR CAS) is required to book these patients to a local MTF if there is an appt. that meets access standards. If not, an appt. to a network provider is given

Terms All Staff Should Know

- **Appointment Standardization (APS)**
 - TRICARE Management Activity (TMA) has mandated we can only use 10 appointment types.
 - Detail codes act as appointment modifiers act as guides for appointing.
 - Central appointing agents can not see “Slot Comments”

Terms All Staff Should Know

- **Non-Enrolled:**
 - Patient not enrolled in TRICARE Prime. Can be active duty family members, retirees or Medicare patients over the age of 65
- **Sent to the Network:**
 - Referrers to TRICARE Prime patients who are scheduled appointments with civilian providers due to limited access in military facility or specialty not available
 - Cost is assigned to WRHCS when their enrolled patients are sent to the network

Terms All Staff Should Know

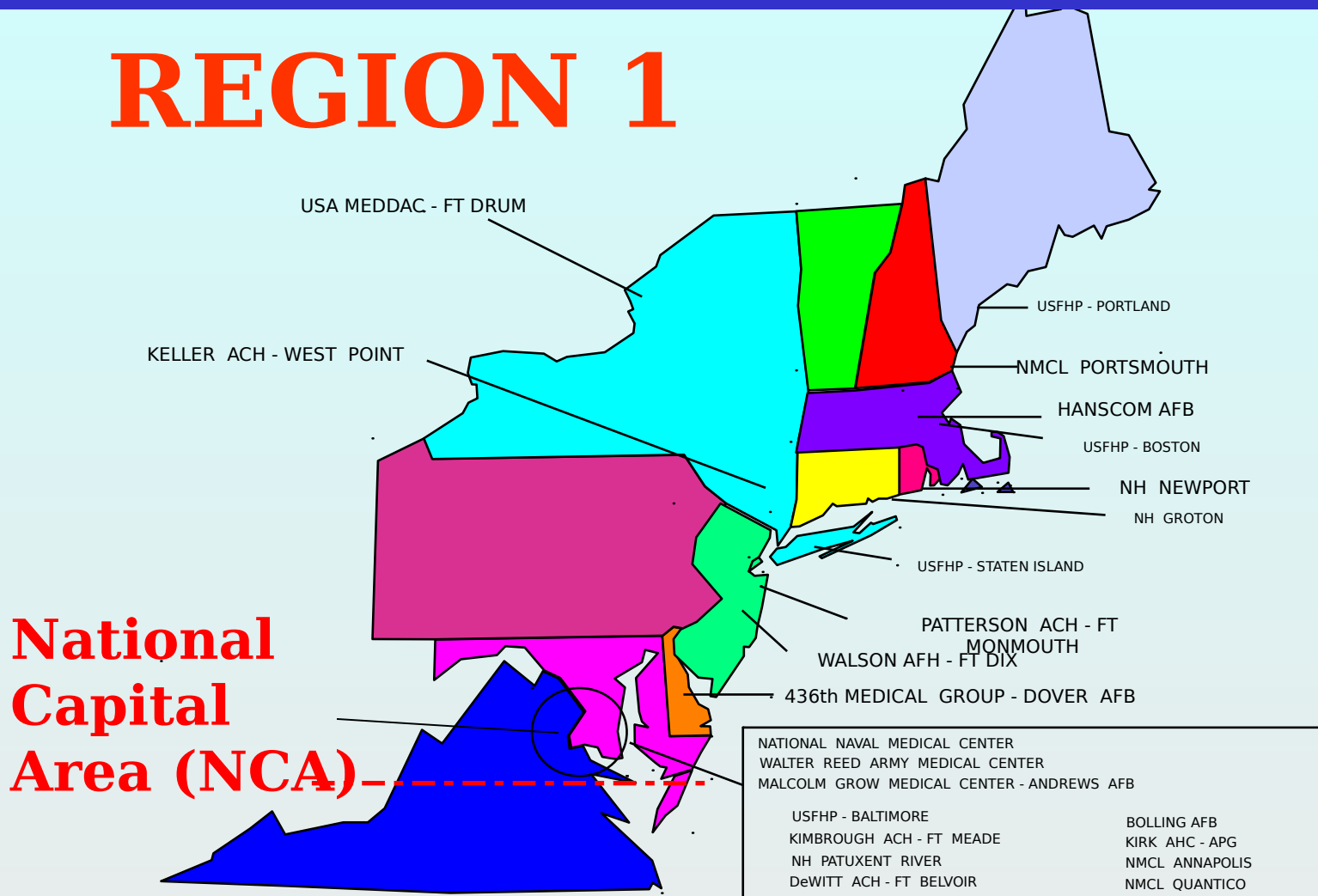
- **Access to Care (ATC)**
 - Measurement tool or codes utilized in CHCS booking to measure patient access to care
 - Codes include
 - **Acute:** Same day primary care with standard of 24 hours
 - **Routine:** Routine primary care with standard of 1 week
(New problems or deterioration of chronic problems.)
 - **Wellness:** Primary care with standard of 4 weeks
(Health maintenance and routine FU care – e.g. HTN, DM)
 - **Specialty:** Initial specialty care with standard of

Terms All Staff Should Know

- **TRICARE for Life**
 - Beneficiary must be over 65 and have Medicare part B.
 - A second payer to Medicare. (If patients can not get an appointment at WRAMC or another MTF, the patient has the option to go to the Network. Medicare will pay part of the payment, TRICARE will pay the rest.) It is free for the patient.
 - TRICARE for Life has nothing to do with appointing.
 - **TRICARE for Life beneficiaries are still seen on a space available basis in the MTF.**

Terms All Staff Should Know

REGION 1



Schedule Management

- What is schedule management?
 - Managing the supply of outpatient appointments to meet patient demand.
 - The three elements of schedule management are:
 - **Appointment Utilization** (Are all appointments being utilized)
 - **Appointment Prioritization** (Do enrolled patients have priority)
 - **Appointment Optimization** (Are schedules effective in allowing providers to see the most patients possible, in the allotted time, without reducing quality of care)

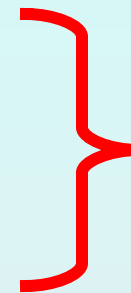
Appointment Utilization

- If high demand clinic, review schedules daily to ensure all appointments are utilized. Review Template Analysis Tool daily at:
www.tricare.osd.mil/Tools
- Determine with chief most effective placement of appointment types (i.e. set follow-up appointments together so they may be joined if unbooked)
- Ensure appointing clerks know protocols for booking appointments if not booked within set time frame. (i.e. all prime slots will be open to all 72 hours prior to appointment)
- Tweak schedules monthly to ensure right mixture of new and follow-up appointments
- Provide for your chief the CHCS clinical **Appointment Utilization Report** on a monthly basis.

Appointment Prioritization

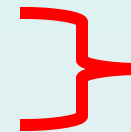
- Order of prioritization is:

- Active Duty
- Active Duty family members who are TRICARE Prime
- TRICARE Prime retirees



Enrolled

- TRICARE Plus



**Enrolled
Primary Care
Only**

- GME patients
- Retirees who are not PRIME and patients over the age of 65



**Non-
Enrolled**

How Do I Know if a Patient is Enrolled?

MCP booking screen will tell you if patient is enrolled.

Clinic patient is enrolled to

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File Edit View Tools Options Help

HEALTH CARE FINDER BOOKING

Patient: [REDACTED] DDS/FMP/SSN: 2
Pat SSN: [REDACTED] Sex/DOB/Age: M
PatCat: USA RET LOS ENLISTED Patient Type: M
Elig St/End: 02Jun1999-INDEFINITE CHCS MCP Status: E
Last Elig Ck: 17Oct2000@113035 Enroll St/End: 0
Dir Care: Y CHA: C MED: N ACV: E Reg Code: 0
PCM: RED TEAM QU Case Mgmt: No PCM Ph#: 7
PCM PLOC: PC PARTNERS QU PCM Location: D

Sponsor: [REDACTED] Spon Rank: S
Spon PatCat: USA RET LOS ENLISTED Duty Phone: 2
Sponsor UIC: SPONSOR RETIRED DSN:
Address: 16962 POINT PLEASANT LANE
City: DUMFRIES Home Phone: 7
St: VA Zip: 22026 Work Phone: 2
Reg Comment:
O/P Rec Room: Reg Updated: 2

Select (P)CM Booking, (R)eferral Booking, (V)iew/Query DEERS,
(F)uture/Past Appts, (L)og Non-MTF Appt, (D)emographics
(O)utput Products, or (Q)uit: P//

Personal data - Privacy act of 1974 (PL 93-579)

ACV code tells you patient category

A = Active Duty

E = TRICARE Prime

L or G = TRICARE Plus

C = Champus

N = Direct Care (some times Active Duty)

Green = Enrolled

Maroon = Enrolled for Primary Care

Blue = Not enrolled

How Do I Know if a Patient is Enrolled?

MCP booking screen will tell you if patient is enrolled.

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File Edit View Tools Options Help

HEALTH CARE FINDER BOOKING

Patient: ZZTEST,TEST [NO] -4233
Pat SSN: 000-00-4233 60/40Y
PatCat: USA RET LOS ENLISTED ← Ensure patient is not Active Duty
Elig St/End: - CHCS MCP Status:
Last Elig Ck: 160ct2000 Primary OHI: AETNA
Dir Care: N CHA: MED: ACV: Reg Code: DMIS:

Sponsor: ZZTEST,TEST [NO] Spon Rank: SERGEANT 1ST CLASS
Spon PatCat: USA RET LOS ENLISTED Duty Phone: 3012952585
Sponsor UIC: W REED ARMY INST RSCH DSN:
Address: 8901 Rockville Pike
City: BETHESDA Home Phone: 301-295-2585
St: MD Zip: 20889 Work Phone: 3012952585
Reg Comment: Reg Updated: 02 May 2000@105818
O/P Rec Room:

Select (A)OP, (N)on-enrollee Booking, (R)eferral Booking, (V)iew/Query DEERS,
(F)uture/Past Appts, (L)og Non-MTF Appt, (D)emographics,
(O)utput Products, or (Q)uit: N//

Pers

If you see this, patient is not enrolled

Appointment Prioritization

- The United States Congress has determined for now, Enrolled patients be seen first and Non-Enrolled be seen on a space available status
- Ensure sufficient **SPEC** appointments are reserved for enrolled patients.
- It is the clinics decision on the number of GME patients clinic must see.
- There are no set quotas for Non-Enrolled patients
- Review monthly **WRAMC Specialty Care Access Report** to see access indicators and SPEC appointment ratios
- **\$** restricts Sierra from booking your appointments. Do not recommend using \$ unless clinic circumstances require it.
- **PBO** restricts WR Central Appointments from booking your appointments. Do not recommend using PBO unless clinic circumstances require it.

Appointment Optimization

- Present chief with monthly CHCS clinical workload report.
- Work with chief to create schedules what will allow optimum provider productivity without sacrificing quality care.

MCP Booking

- Review TRICARE web site to stay current with schedule management issues:
www.tricare.osd.mil/tai/default.htm
- Ensure booking personnel understand:
 - Referral booking
 - UDKs
 - How to join and change appointments
 - Region 1/WRAMC protocols and business rules
 - Understand ATC categories

Referral booking

The only mandatory search criteria is Place of Care
Do not use location. If you see location entered, take it out.

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File Edit View Tools Options Help

MCP Referral: 20000675066 Referral Date/Time: 30 Aug 2000@0951

REFERRAL ENTER/EDIT

Patient: ZZTEST,TEST [N0 FMP/SSN: 20/000-00-4233
Pat SSN: 000-00-4233 Sex/DOB/Age: F/15 Jul 1960/40Y
Pat Cat: USA RET LOS ENLISTED Patient Type: SUPPLEMENTAL CARE
Home Zip: 20889 Duty Phone: 3012952585
Home Phone: 301-295-2585 Work Phone: 3012952585
Primary OHI: AETNA

=====

Referred by: REFERRAL,BE HOST Referral from: MIL FAM HLTH BE
Priority: ROUTINE # of Visits Requested: 3
ATC Category: WELLNESS Appt Type: MSURG
Clinic Specialty: Start Date: 30 Aug 2000
Prov Specialty: Stop Date: 29 Dec 2000
Place of Care: UROLOGY CL B Start Time: 0001
Provider: Stop Time: 2400
Spec Type: UROLOGY Days of Week: M TU W TH F SA SU
Location: Prefer Gender:
Language:

Help = HELP Exit = F10 File/Exit = D0 INSERT OFF

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**Ensure
right ATC
Code is
entered**

Referral booking

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File Edit View Tools Options Help

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Patient: ZZTEST,TEST [N0 FMP/SSN: 20/000-00-4233
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Spec Type: UROLOGY	Days of Week: M TU W TH F SA SU
Location:	Prefer Gender:
Language:	

Help = HELP Exit = F10 File/Exit = D0 INSERT OFF

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**Ensure patient
has sufficient
authorized
visits and
dates**

How to convert and join appointments

1

HEALTH CARE FINDER BOOKING

Patient: ZZTEST,TEST [NO] DDS/FMP/SSN: -/20/000-00-4233
Pat SSN: 000-00-4233 Sex/DOB/Age: F/15 Jul 1960/40Y
PatCat: USA F LOS ENLISTED Patient Type: SUPPLEMENTAL CARE D
MCP Status: Primary OHI: AETNA Reg Code: DMIS:
Spon Rank: SERGEANT 1ST CLASS
Duty Phone: 3012952585
Sponsor UIC: W REED ARMY INST RSCH
Reg 5-2585
O/P R 2585
20000105818

Select (A)OP, (N)on-enrollee Booking, (R)eferral Booking, (V)iew/Query DEERS,
(F)uture/Past Appts, (L)og Non-MTF Appt, (D)emographics,
(O)utput Products, or (Q)uit: N//

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*At this time, you can not join appointments in referral booking, only non-referral booking

2

NON-ENROLLEE SINGLE PATIENT BOOKING

Patient: ZZTEST,TEST [NO] FMP/SSN: 20/000-00-4233
Patient Type: SUPPLEMENTAL CARE DIAGNOSIS ATC Category: FUTURE REQUEST
Place of Care: DERMATOLO CL WR/WRAMC Appt Type:
PLOC Phone: 202 782-6175/6176 Spec Type:
Provider: Clinic Spec:
Location: Provider Spec:
Date Range: 13 Oct 2000 to 11 Jan 2001 Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400

+	THU	1340	16 Nov 00	NEW	1/0	WR	HALL, M	PRIME
	THU	1400	16 Nov 00	FU	1/0	WR	MAINO, K	PRIME
	THU	1400	16 Nov 00	NEW	1/0	WR	SCHULZ-BUTULIS,	PRIME
	THU	1400	16 Nov 00	FU	1/0	WR	HALL, M	PRIME
	THU	1420	16 Nov 00	FU	1/0	WR	MAINO, K	PRIME
	THU	1420	16 Nov 00	FU	1/0	WR	HALL, M	PRIME
+	THU	1430	16 Nov 00	DBFU	1/0	WR	GAERTNER, E	DR'S BOOK ONLY

Use SELECT
Press F9 to

Find two appointments together with same provider. Remember provider and date.

Hit return, then select browse

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3

NON-ENROLLEE BOOKING SEARCH CRITERIA

Patient: ZZTEST,TEST [NO] FMP/SSN: 20/000-00-4233
Patient Type: SUPPLEMENTAL CARE DIAGNOSIS ATC Category: FUTURE REQUEST
Place of Care: DERMATOLO CL WR/WRAMC Appt Type:
PLOC Phone: 202 782-6175/6176 Spec Type:
Provider: Clinic Spec:
Location: Provider Spec:
Date Range:
Time Range:

Patient Home

Select (C)hange Search Criteria, (M)TF Booking, (B)rowse, (A)ppt Refusal,
(F)uture/Past Appts, or (Q)uit: █

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NON-ENROLLEE SINGLE PATIENT BROWSE SEARCH CRITERIA

Patient: ZZTEST.TEST [NO] FMP/SSN: 20/000-00-4233

Clinic: DERMATOLO CL WR/WRAMC

Clinic Phone: 202 782-6175/6176

Provider: Date: 13 Oct 2000

Provider
Date

Select change search criteria, then select provider and date. Enter desired provider and date you want to join appt type for.

Use SELECT key to select

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NON-ENROLLEE SINGLE PATIENT BROWSE

Patient: ZZTEST.TEST [NO] FMP/SSN: 20/000-00-4233

Clinic: DERMATOLO CL WR/WRAMC

Clinic Phone: 202 782-6175/6176

Provider: HALL,MARK A Date: 15 Nov 2000

-WED	0800	15 Nov 00	NEW	1/1	20 MIN	BOOK	PRIME
WED	0820	15 Nov 00	NEW	1/0	20 MIN	OPEN	PRIME
WED	0840	15 Nov 00	NEW	1/0	20 MIN	OPEN	PRIME
* WED	0900	15 Nov 00	FU	1/0	20 MIN	OPEN	PRIME
* WED	0920	15 Nov 00	FU	1/0	20 MIN	OPEN	PRIME
-WED	0940	15 Nov 00	FU	1/1	20 MIN	BOOK	PRIME
WED	1000	15 Nov 00	NEW	1/0	20 MIN	OPEN	PRIME
WED	1020	15 Nov 00	NEW	1/0	20 MIN	OPEN	PRIME
WED	1040	15 Nov 00	DBFU	1/0	20 MIN	OPEN	DR'S BOOK ONLY
+ WED	1100	5 Nov 00	NEW	1/0	20 MIN	OPEN	PRIME

Select one slot to Change, Split, Book, or Overbook.

Select

Press

Tell system to search schedules, then select two appointments you want to join

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NON-ENROLLEE SINGLE PATIENT BROWSE

Patient: ZZTEST.TEST [NO] FMP/SSN: 20/000-00-4233

Clinic: RHEUMATOL CL WR/WRAMC

Clinic Phone: 202 782-6734/6735

Provider: ROEBUCK,JON D Date: 03 Nov 2000

-FRI	0830	03 Nov 00	NEW	1/1	60 MIN	BOOK	prime
-FRI	0930	03 Nov 00	FU	1/1	30 MIN	BOOK	
* FRI	1000	03 Nov 00	FU	1/0	30 MIN	OPEN	
* FRI	1030	03 Nov 00	FU	1/0			

Select Join

Select (J)oin, (V)iew, or (O)uit: j

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APPOINTMENT SLOTS: 1 SINGLE PATIENT BROWSE - CHANGE

FRI 1000 03 Nov 00 FU 1/0 30 MIN OPEN

Clinic: RHEUMATOL CL WR

Provider: ROEBUCK,JON D

Division: WALTER REED AMC

Booked appointments:

Maximum overbooks allowed: 0

Duration: 30 minutes

Day of Week: FRI

Appointment Slot Status: OPEN

Appointment Type: NEW

Number of patients: 1

Appointment SLOT Comment:

Change appt type and file

Ask for Help = HELP Screen Exit = F10 File/Exit = D0 INSERT OFF

Customer Service Common Sense

- Do not go into great detail with **non-enrolled** patients about how many appointments are available for enrolled patients.
- Ensure patients referral is current and allows them to obtain the needed follow-up care without incident.
- No policy or protocol can cover every situation. Listen to the patient and **do what is right for the patient**. Figure out the administrative details later.
- Patients do not understand all medical/TRICARE terminology. Speak to the patient professionally at their level. All the patient cares about is **seeing the right provider in the right place, at the right time**.